SurveyUP for SharePoint

USER GUIDE

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Introduction

This user guide is developed by Speals company and contains important information for successful deployment and usage of SurveyUP for SharePoint solution in your environment. We recommend to review this guide carefully before product deployment and usage. Additional information regarding the solution can be found at the product homepage:

http://www.speals.com/products/surveyup/default.aspx

Deployment and licensing

The product distributive is zip-archive, contains the following files:

- **deployment.en.txt** – brief deployment manual.
- **license.en.txt** – EULA (plain-text).
- **SpealsSurveyUP.wsp** – solution's file.
- this guide in **PDF** and **MHT**.

The solution from **SpealsSurveyUP.wsp** is deployed by standard way.

Administrative utility – **stsadm.exe** - must be used for deployment. This utility can be found in the following folders:

- Windows SharePoint Services 3.0 or Microsoft Office SharePoint Server 2007
  C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\12\BIN
- SharePoint Foundation 2010 or Microsoft SharePoint Server 2010
  C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\14\BIN

To process the deployment successfully you need to have administrator's permissions for the whole SharePoint farm and for specified server where the product will be installed.

Required components checking

The set of installed components is required for the product functioning. Set the components in compliance with the list below.

- Microsoft .NET Framework 3.5 with Server Pack 1.
  Download from Microsoft Download Center
- One of the following SharePoint line products:
  - Windows SharePoint Services 3.0
  - Microsoft Office SharePoint Server 2007
  - SharePoint Foundation 2010
  - Microsoft SharePoint Server 2010

Deployment

The solution's deployment procedure is the same for all SharePoint-line products.

To process the deployment successfully you need to have administrator's permissions for the whole SharePoint farm and for specified server where the product will be installed.

Deployment steps

1. Extract files from **SpealsSurveyUP.zip** to any folder on any SharePoint farm server.
2. Add **SpealsSurveyUP.wsp** to the solution storage with the following command:
   `> stsadm -o addsolution -filename SpealsSurveyUP.wsp`
3. Deploy added solution with the command below:
   `> stsadm -o deploysolution -name SpealsSurveyUP.wsp -allowgacdeployment -allcontenturls -immediate`
4. Wait successful finish of deployment. To check the final status of deployment you can use the command:
   `> stsadm -o displaysolution -name SpealsSurveyUP.wsp`
   The result should contain **`<Deployed>`** parameter, which value is **TRUE**.

When the deployment has been successful finished, you could start to activate and set up the product as it described in Product usage section.

Updating

The update procedure for the solution is the same as for all SharePoint-line products.

To realize update procedure successfully you need to have administrator's permissions for whole SharePoint farm and for specified server where the product will be deployed.

It is not required any additional actions to update the solution.

Update steps

1. Extract files from **SpealsSurveyUP.zip** any folder on any SharePoint farm server.
2. Update the solution with the following command:
   `> stsadm.exe -o upgradesolution -name SpealsSurveyUP.wsp -filename SpealsSurveyUP.wsp -allowgacdeployment -immediate`
3. Wait successful finish of updating. To check the final status of update you can use the command:
   `> stsadm -o displaysolution -name SpealsSurveyUP.wsp`
   The result should contain **`<Deployed>`**, parameter, which value is **TRUE** and **`<LastOperationResult>`** parameter with **`DeploymentSucceeded`** value.
4. We recommend to restart **Windows SharePoint Services Timer** (**SharePoint 2010 Timer**) service on each server in the farm when the updating procedure is completed.

Removal

The removal procedure for the solution is the same as for all SharePoint-line products.

To realize update procedure successfully you need to have administrator's permissions for whole SharePoint farm and for specified server where the product will be deployed.

Product settings are saved in additional SharePoint databases after removal, so removal and further re-deployment procedures for the solution can be processed without any additional background.

Removal steps

1. Removal is initiated with the following command:
   `> stsadm -o retractsolution -name SpealsSurveyUP.wsp -allcontenturls -immediate`
2. Wait successful finish of removal. To check the final status of removal you can use the command:
   `> stsadm -o displaysolution -name SpealsSurveyUP.wsp`
   The result should contain **`<Deployed>`**, parameter, which value is **FALSE** and **`<LastOperationResult>`** parameter with **`DeploymentSucceeded`** value.
3. Remove the solution from SharePoint solutions storage:
   `> stsadm -o deletesolution -name SpealsSurveyUP.wsp`
4. We recommend to restart **Windows SharePoint Services Timer** (**SharePoint 2010 Timer**) service on each server in the farm, when the removal procedure is completed.

Licensing

SurveyUP for SharePoint has 30-day trial for testing and evaluation of the solution in your environment. There are not any functional limitations in the trial.

You need to register the product and purchase the additional numbers of licensing keys when trial is expired. Otherwise, you need to stop using the product and remove it from SharePoint farm as it is described in Removal section.

To purchase the licensing key(s) (license the product) you need to visit Speals web-site:

http://www.speals.com/purchase/default.aspx

When you have got the licensing key(s), it is required to enter it to SharePoint farm. It can be done with the following command:

```
> stsadm -o surveyupregister -key XXXXXXXXXXXXXXXXXXXX
```

Insert received licensing key instead XXXXXXXXXXXXXXXXXXXX. If you need to enter several licensing keys, so repeat this command several times with a new key for each time.

When licensing key(s) is entered, all trial limitations will be removed.

Product usage

Introduction

SurveyUP for SharePoint web-part is intended for simple but very important operation: it allows to place survey question and result forms on any page of SharePoint site. Furthermore it contains a range of settings for survey appearance improvement.

It's important to understand that the web-part displays survey appearance only. The list contains survey questions and results is ordinary internal 'Survey' type SharePoint list.

The survey can be created by standard way. Short description of this operation is presented in Survey creation section.

After the survey creation is successfully completed, the survey can be displayed with SurveyUP for SharePoint web-part. The procedure of adding and setting of the web-part is described in Adding and setting up web-part section.

Survey creation

The procedure of SharePoint survey creation is not a feature of SurveyUP web-part. However this procedure is described in this guide too to take a complete look to the process. The procedure of survey creation has some difference for different versions of SharePoint.

Survey creation in SharePoint 2007

To create a survey, you must have permission to create lists on the site where you are creating the survey.

1. Click **View All Site Content**, and then click **Create** on the All Site Content page.
   Tip In most cases, you can use the **Site Actions** menu

instead to complete this step.
2. Under **Tracking**, click **Survey**.
3. In the **Name** box, type a name for the survey. The name is required. The name appears at the top of the survey page. The name becomes part of the Web address for the survey page, and it appears in navigational elements that help users to find and open the survey.
4. In the **Description** box, type a description of the survey. The description is optional.
5. To add a link to this list on the Quick Launch, click **Yes** in the **Navigation** section.
6. In the **Survey Options** section, specify whether you want people's names to appear with their responses and whether people can respond more than once to the survey.
7. Click **Next**.
8. On the New Question page, enter your question text and then select the type of answer that you want in the **Question and Type** section for your first question.
9. In the **Additional Question Settings** section, specify additional settings for your question, such as whether an answer to the question is required. Depending on the type of question, you can also enter answers to choose from and an optional default value.
10. Do one of the following:

- To create additional questions, click **Next Question**, and then enter information for the next question. Continue the process until you add all the questions that you want.
- If you are finished adding questions, click **Finish**.

11. To see your survey, click its name in the breadcrumb navigation at the top of the page.

Survey creation in SharePoint 2010

To create a survey, you must have permission to create lists on the site where you are creating the survey.

1. Click **Site Actions**

, and then click **View All Site Content**.
2. On the **All Site Content** page, click **Create**.
3. Under **Data**, click **Survey**.
4. In the **Name** box, type a name for the survey. The name is required. The name appears at the top of the survey page. The name becomes part of the Web address for the survey page, and it appears in navigational elements that help users to find and open the survey.
5. Click **More Options** to enter a description and to specify navigation and survey options.
6. In the **Description** box, type a description of the survey. The description is optional.
7. To add a link to this list on the Quick Launch, click **Yes** in the **Navigation** section.
8. In the **Survey Options** section, specify whether you want people's names to appear with their responses and whether people can respond more than once to the survey.
9. Click **Create**.
10. On the New Question page, enter your question text and then select the type of answer that you want in the **Question and Type** section for your first question.
11. In the **Additional Question Settings** section, specify additional settings for your question, such as whether an answer to the question is required. Depending on the type of question, you can also enter answers to choose from and an optional default value.
12. In the **Column Validation** section, if you want to check whether an answer is valid, enter the formula you want to use for validation in the **Formula** box. In the **User Message** box, describe what the user needs to do to ensure the answer is valid. For example, if you're asking an employee to enter the amount of time she's worked in a department, you can specify that it could not be longer than the total time she's worked for the company.
13. Do one of the following:
    - To create additional questions, click **Next Question**, and then enter information for the next question. Continue the process until you add all the questions that you want.
    - If you are finished adding questions, click **Finish**.
14. To see your survey, click its name in the breadcrumb navigation at the top of the page.

Adding and setting up web-part

Adding web-part can be done by usual way. There are some differences for different version of SharePoint.

Adding web-part in SharePoint 2007

The fastest way to add a Web Part to a Web Part Page is to use the **Add Web Parts** dialog box. You can use this dialog box to quickly add lists, libraries, and other Web Parts to your Web Part Page. If you are a site owner, you can add new Web Parts to the list that is displayed in the **Add Web Parts** dialog box, and you can create custom groups that you can use to display certain Web Parts together in the list.

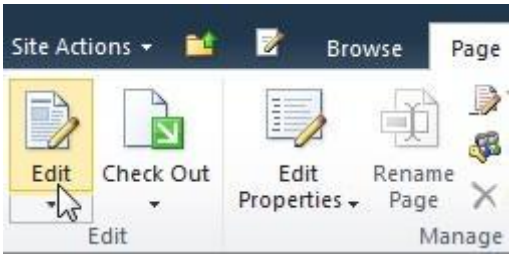
1. On the **Site Actions** menu

, click **Edit Page**.
2. In the Web Part zone that you want to add the Web Part to, click **Add a Web Part**.
3. In the **Add Web Parts** dialog box, select the check box for the Web Part **SurveyUP for SharePoint** that you want to add to the page.
4. Click **Add** to add the Web Parts to the page.

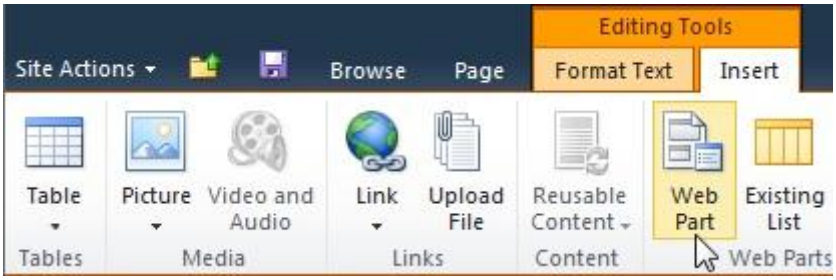
Adding web-part in SharePoint 2010

To edit a page you must have at least the permissions obtained by being added to the default <Site Name> Members SharePoint group for the site.

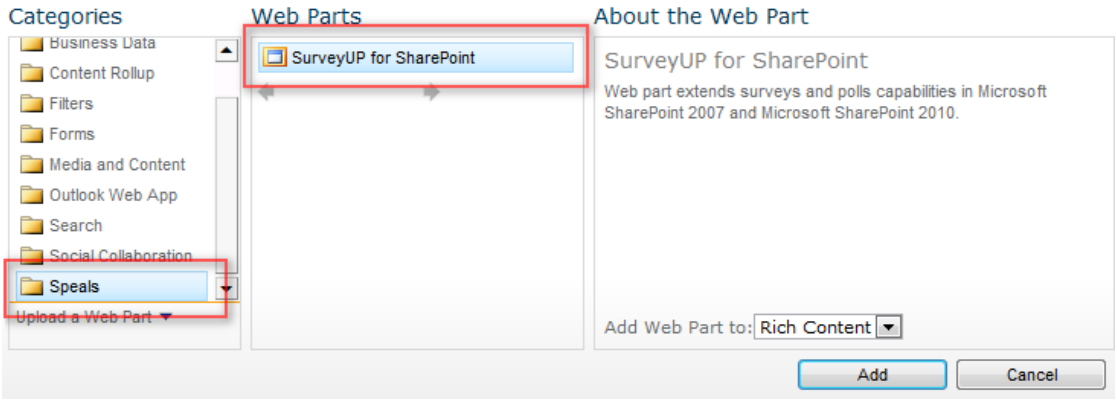
1. From a page, in the ribbon, click the **Page** tab, and then click the **Edit** command.



2. Note If the **Edit** command is disabled, you may not have the permissions to edit the page. Contact your administrator.
3. Click on the page where you want to add a Web Part, click the **Insert** tab, and then click **Web Part**.



4. Under Categories, select a category **Speals**, select the **Web Part SurveyUP for SharePoint** and then click **Add**.



5. When you select a Web Part, information about the Web Part is displayed in **About the Web Part**.

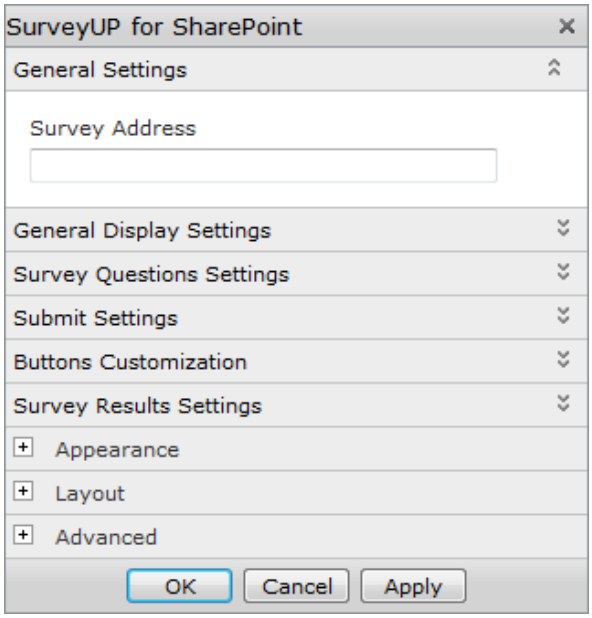
6. When you have finished editing the page, click the **Page** tab, and then click **Save & Close**.

Web-part settings

SurveyUP for SharePoint web-part settings can be assigned with standard web-part settings pane.

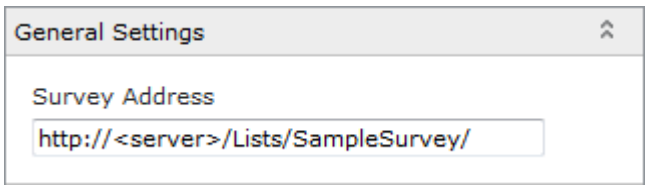
The web-part has two main displaying modes: **Questions** and **Results**. Survey Results Settings section is responsible for **Results** displaying mode, other settings allow to define **Questions** displaying mode, and some other options of web-part behavior.

The question 'What displaying mode will be used in the current time' is resolved with many factors. It takes into account user permissions, the current state of answers, the ability of multiple answering, etc.



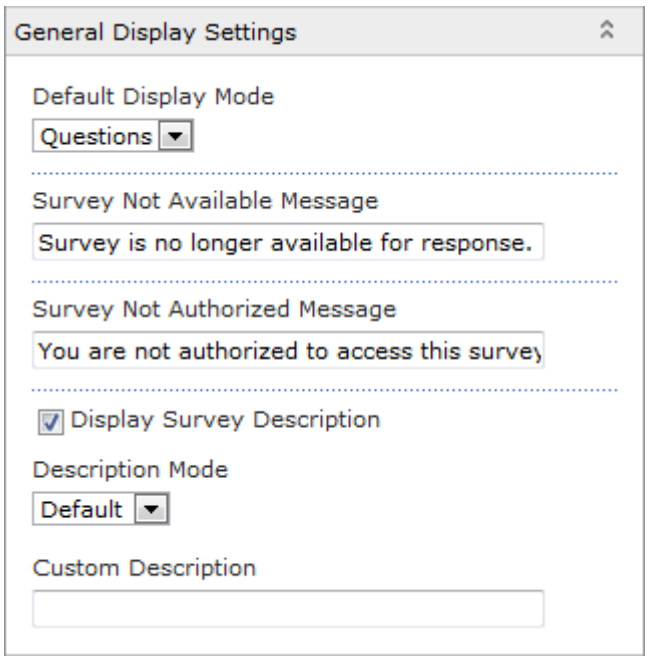
For convenient usage the settings are divided on different groups. The description of these groups are placed in the points below.

General Settings

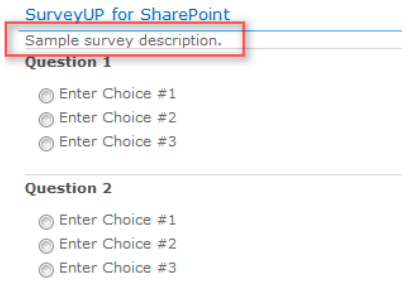


- **Survey Address**
  The address (URL) of the survey list. This is only one obligatory parameter. The example: http://<server>/Lists/SampleSurvey/.

General Display Settings

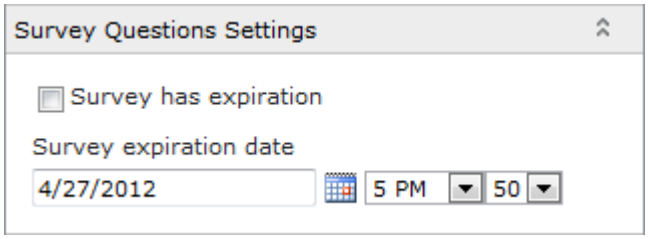


- **Default Display Mode**
  The preferable mode of initial displaying of web-part: **Questions** or **Results**.
- **Survey Not Available Message**
  The text about survey's unavailability.
- **Survey Not Authorized Message**
  The message text about insufficient permissions for answering to the survey or viewing survey results.
- **Display Survey Description**
  To display / not to display the description of the survey.



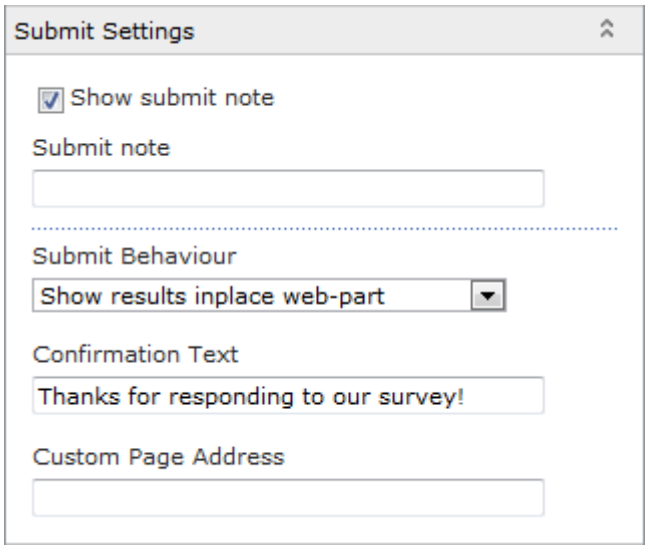
- **Description Mode**
  To use list description or custom description as a description of survey.
- **Custom Description**
  The custom description which is defined by user.

Survey Questions Settings

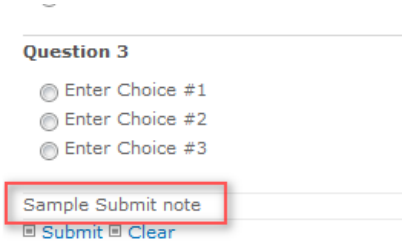


- **Survey has expiration**
  The survey will be unavailable after the date set up in the parameter below, if this option is active.
- **Survey expiration date**
  The date of survey finishing.

Submit Settings



- **Show submit note**, **Submit note**
  To show the message text over the **Submit** button. This message will be displayed only if **Submit** button is available for respondent.



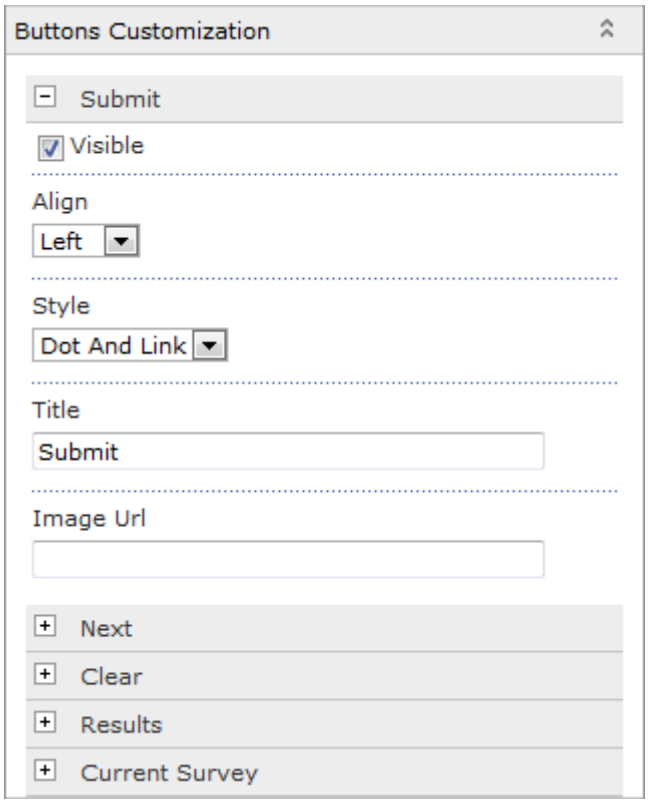
- **Submit Behaviour**
  To define the action which will happen after **Submit** button pressing:
  - **Show results inplace web-part**
    To show the web-part in **Results** mode.
  - **Show confirmation**
    To show the message defined in **Confirmation Text** field.
  - **Redirect to Overview page**
    To pass on **overview.aspx** page of survey list.
  - **Redirect to Graphical Summary page**
    To pass on **summary.aspx** page of survey list.

- **Redirect to All Responces page**
  To pass on **AllItems.aspx** page of survey list.
- **Redirect to custom page**
  To pass on the page defined in **Custom Page Address** field.

- **Confirmation Text**
  The text message which is displayed after the respondent has finished to answer survey questions.
- **Custom Page Address**
  The respondent is transferred to this address (URL) after he/she has finished to answer survey questions.

Buttons Customization

Depending of the current displaying mode the web-part uses several different buttons which is intended to provide one or another action to the user. The displaying features is the same for each of buttons. The description below is described **Submit** button features, however this description is true for any other buttons.



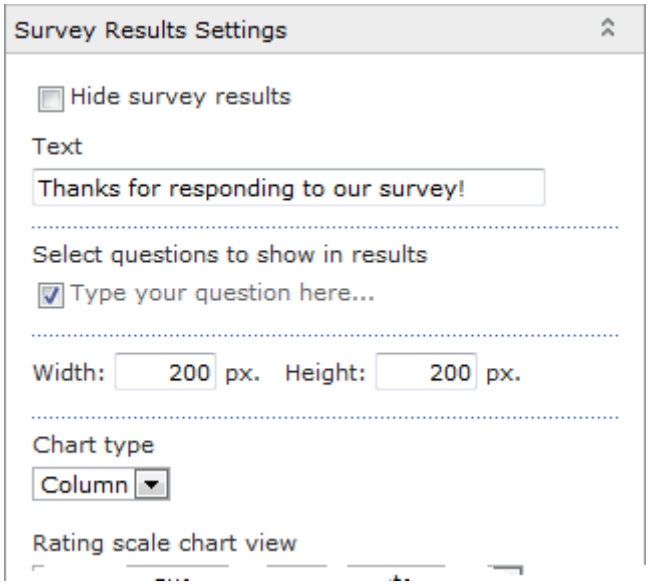
- **Visible**
  If this flag is inactive, the button is displayed noway.
- **Align**
  The position of the button on the web-part page: **Left**, **Right**.
- **Style**

  Dot and Link Submit Link Submit Button Submit Image Custom image

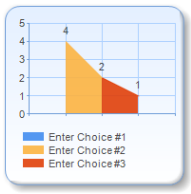
- **Title**
  The text for the button.
- **Image Url**
  The address of the image for the button.

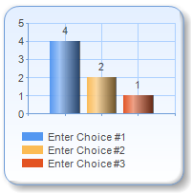
Survey Results Settings

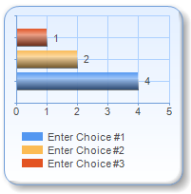
The group of setting which define the appearance of web-part page in **Results** mode.

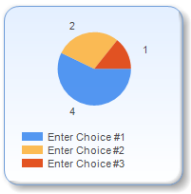


- **Chart type**

Area 

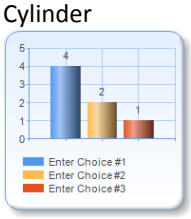
Column 

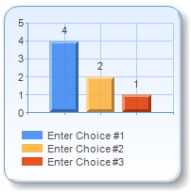
Bar 

Pie 

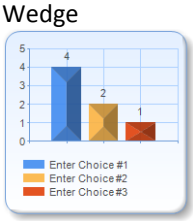
Line

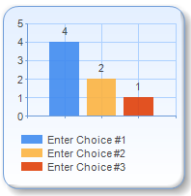
- **Rating scale chart view**
  The parameter defines the way to display answer like **Rating Scale**: **All sub-questions on a single chart**, **Each sub-question on a separate chart**.
- **Drawing style**

Cylinder 

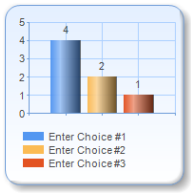
Emboss 

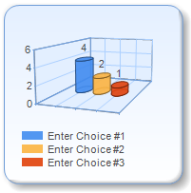
LightToDark

Wedge 

Default 

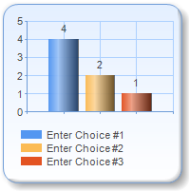
- **Enable 3D style**

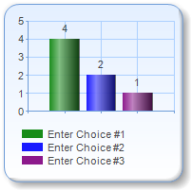
Disabled 

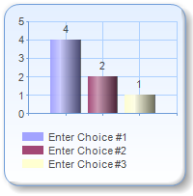
Enabled 

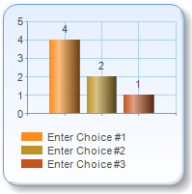
- **Chart color palette**. Several examples:

None Bright Grayscale Excel EarthTones







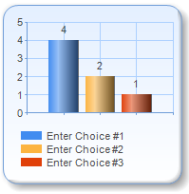


- **Use single color on series points**

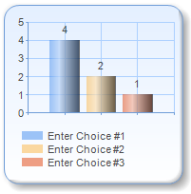
Enabled

- **Transparency**

0%



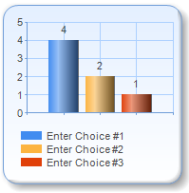
50%



90%

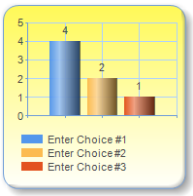
- **Background color**. Examples:

E3EFFF



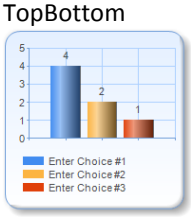
56FF4A

FFF954

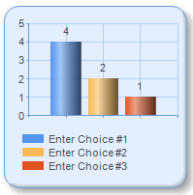


- **Background gradient style**. Several examples:

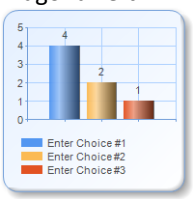
TopBottom



None

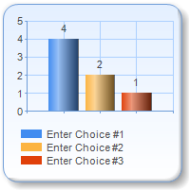


DiagonalLeft

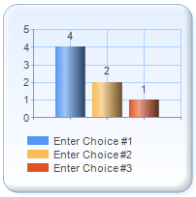


- **Chart border style**

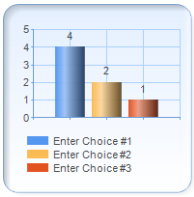
Emboss



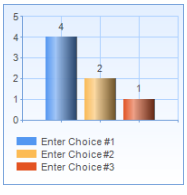
Raised



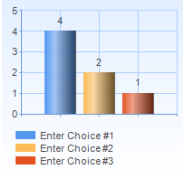
Sunken



Line

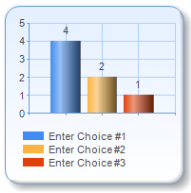


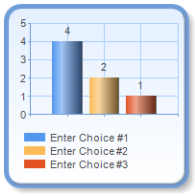
None



- **Chart border width**

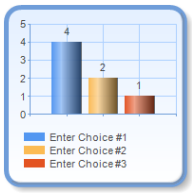
1px 5px 10px



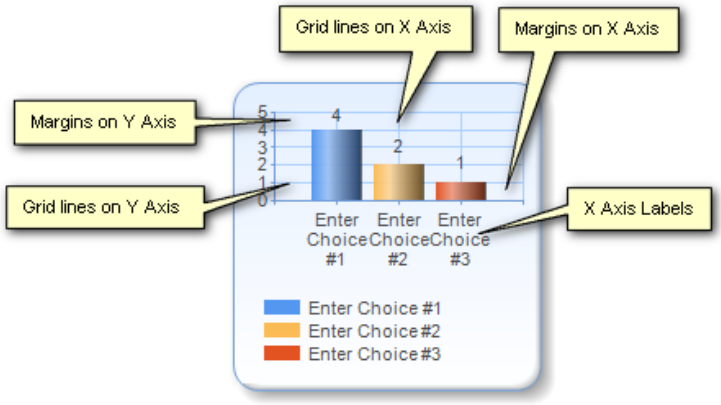


- **Chart border color**

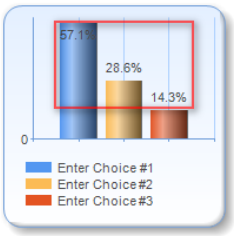
6F9DD9 D92F0D 09D909



- **Show grid lines on X Axis**, **Show margins on X Axis**, **Enable X Axis Labels**, **Show grid lines on Y Axis**, **Show margins on Y Axis**.

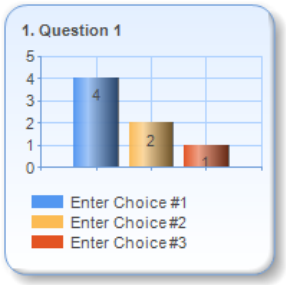


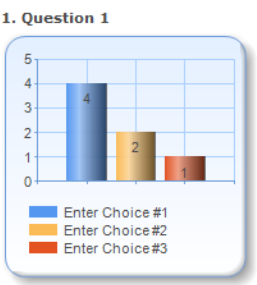
- **Axis color**, **Axes labels color**, **Axes labels size**, **Grid lines color**, **Grid lines color**.
  The parameters for the elements mentioned above.
- **Show values in percentages**

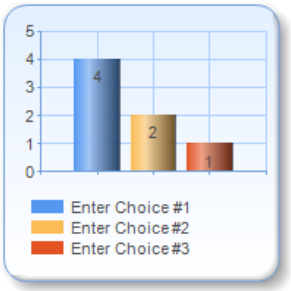


- **Answer title position**

Inside Outside Disabled

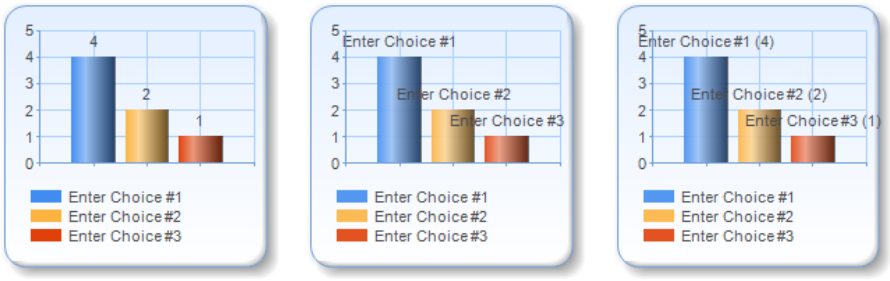






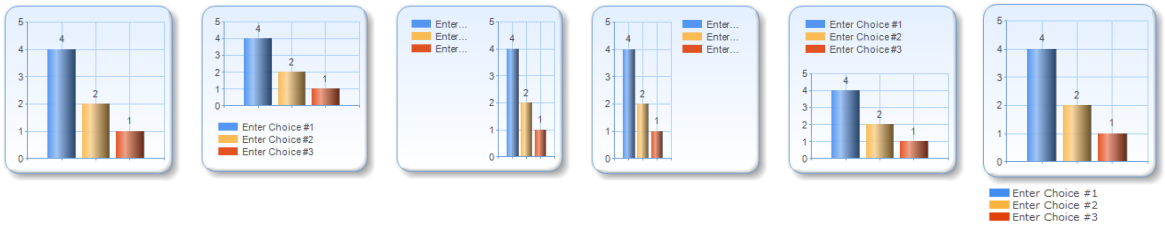
- **Label style**

Value Argument Argument and value



- **Label font size**, **Label font color**.
  The parameters for the elements mentioned above.
- **Legend appearance**

None Bottom Left Right Top Outside the chart



- **Legend style**, **Legend font size**, **Legend font color**
  The parameters for the elements mentioned above.